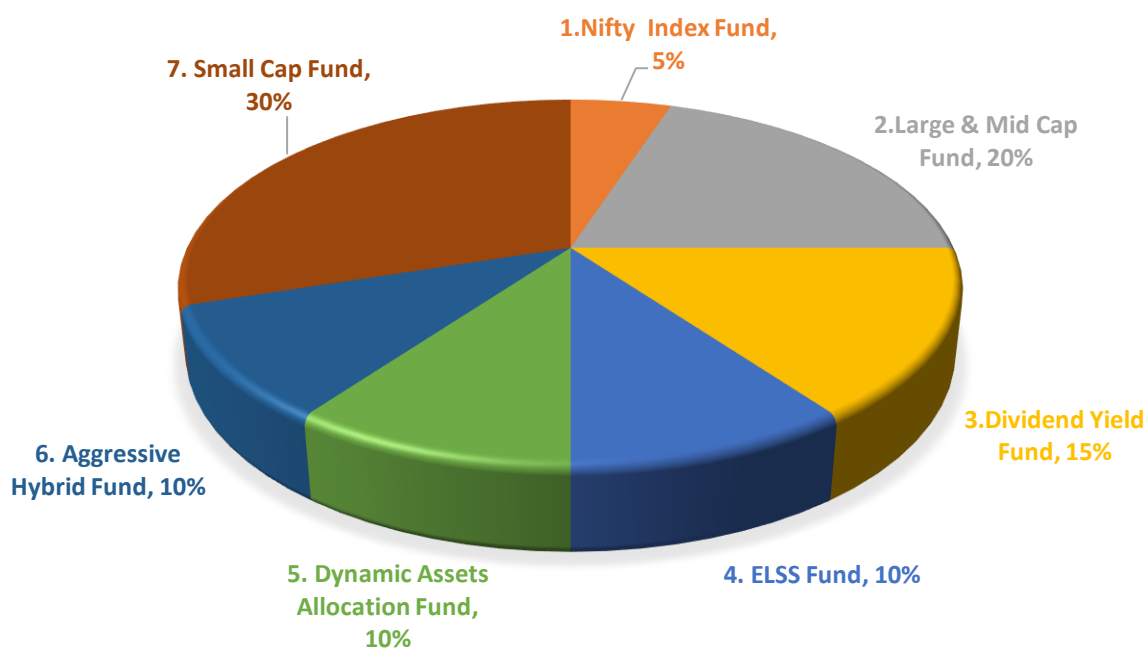


## Model Portfolio and Expected Systematic Investment Plan (SIP) Return in 05/10/15/20/25/30 years

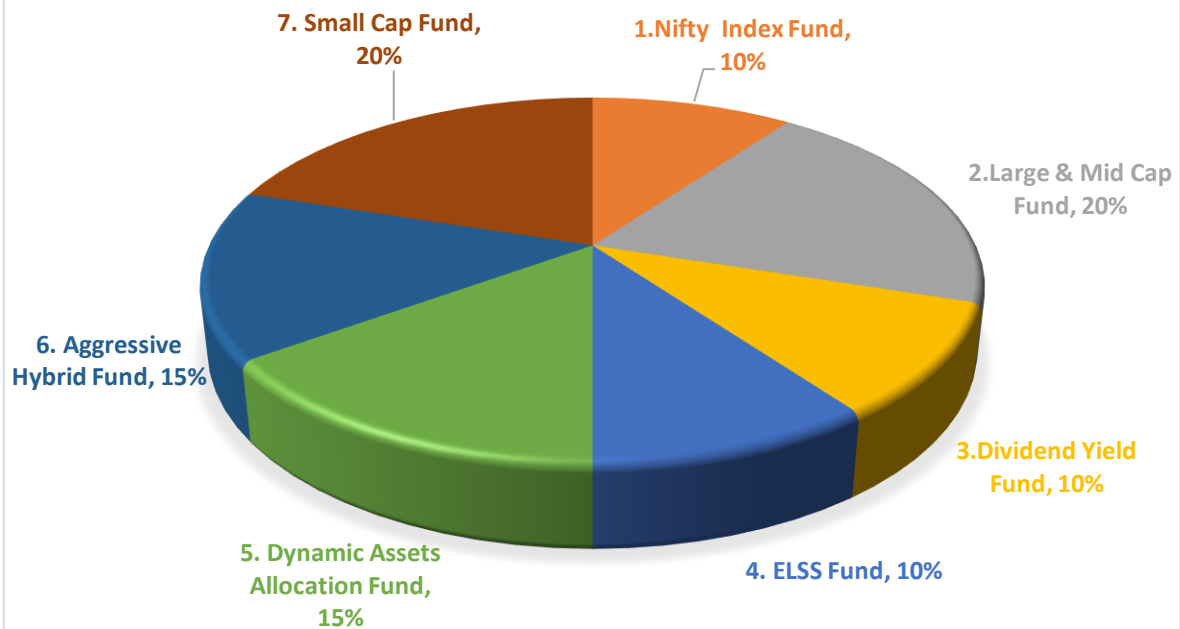
Mutual Fund Investment for Wealth Creation at different age groups					
Category	Expected Annualised Return	Age Group (Years) and Share of Investment			
		25 to 40	41 to 50	51 to 60	61 to 70
Nifty Index Fund	12%	10%	10%	10%	5%
Large & Mid Cap Fund	14% to 16%	20%	20%	20%	5%
Dividend Yield Fund	15%	10%	10%	10%	10%
ELSS Fund	14% to 16%	10%	10%	10%	0%
Dynamic Assets Allocation Fund	14% to 16%	10%	15%	20%	40%
Aggressive Hybrid Fund	15%	10%	15%	20%	40%
Small Cap Fund	20% to 22%	30%	20%	10%	0%
		100%	100%	100%	100%

### INVESTORS AGE GROUP BETWEEN 25 TO 40 YEARS AND SHARE OF MF INVESTMENT

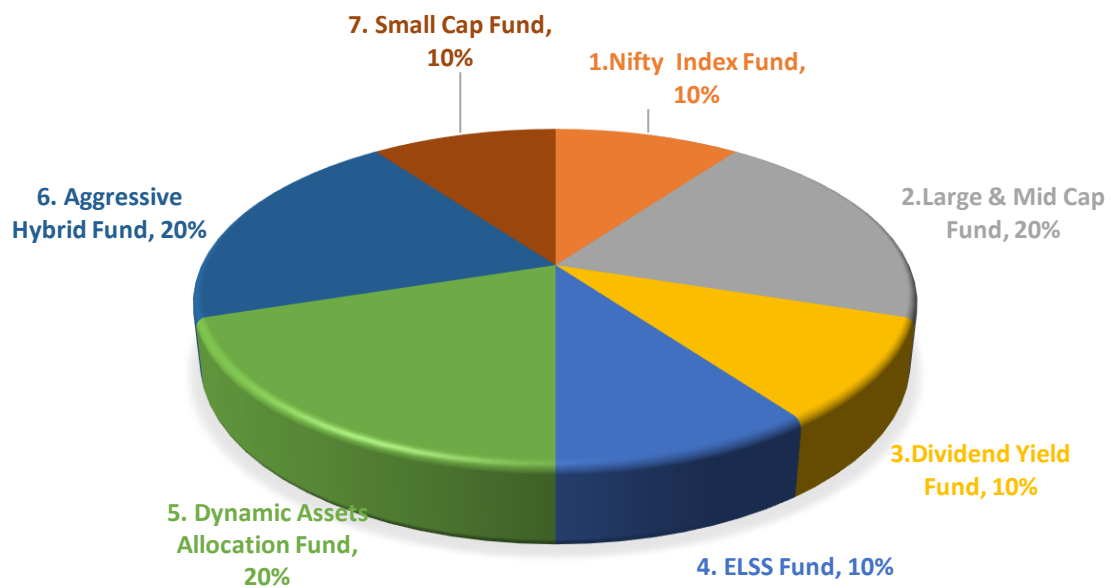


**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.

### INVESTORS AGE GROUP BETWEEN 41 TO 50 YEARS AND SHARE OF MF INVESTMENT

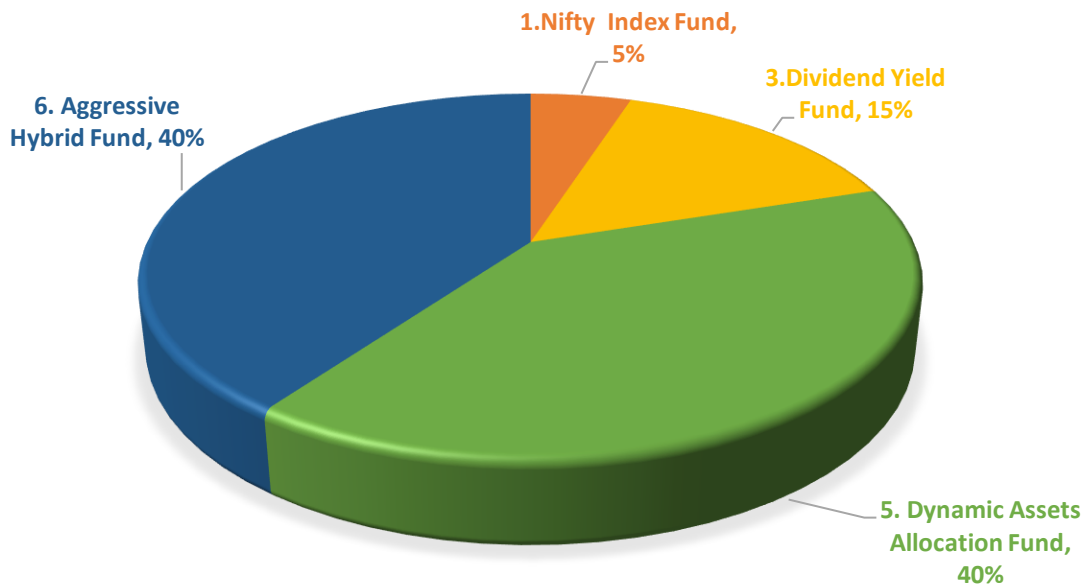


### INVESTORS AGE GROUP BETWEEN 51 TO 60 YEARS AND SHARE OF MF INVESTMENT



**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.

### INVESTORS AGE GROUP BETWEEN 61 TO 70 YEARS AND SHARE OF MF INVESTMENT



**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.

## **Expected Systematic Investment Plan (SIP) Return in 05/10/15/20/25/30 years**

Let's see the total Investment and Expected Wealth in 5/10/15/20/25/30 years, if you invest in Index Fund through SIP with an expected Annualised Return @12%.

Investment in Index Fund ( Expected Annualised Return @ 12%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	60,000	1,20,000	1,80,000	2,40,000	3,00,000	3,60,000
	Expected Wealth	82,486	2,32,339	5,04,575	9,99,147	18,97,635	35,29,913
2000	Investment	1,20,000	2,40,000	3,60,000	4,80,000	6,00,000	7,20,000
	Expected Wealth	1,64,972	4,64,678	10,09,150	19,98,294	37,95,270	70,59,826
5000	Investment	3,00,000	6,00,000	9,00,000	12,00,000	15,00,000	18,00,000
	Expected Wealth	4,12,430	11,61,695	25,22,875	49,95,735	94,88,175	1,76,49,565
10000	Investment	6,00,000	12,00,000	18,00,000	24,00,000	30,00,000	36,00,000
	Expected Wealth	8,24,860	23,23,390	50,45,750	99,91,470	1,89,76,350	3,52,99,130

Let's see the magic of your wealth, if you step up your SIP amount by 10% annually.

Investment in Index Fund ( Expected Annualised Return @ 12%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	73,261	1,91,249	3,81,270	6,87,300	11,80,165	19,73,928
	Expected Wealth	98,457	3,37,433	8,68,385	19,88,872	42,75,546	88,34,123
2000	Investment	1,46,522	3,82,498	7,62,540	13,74,600	23,60,329	39,47,857
	Expected Wealth	1,96,914	6,74,866	17,36,770	39,77,744	85,51,092	1,76,68,246
5000	Investment	3,66,306	9,56,245	19,06,349	34,36,500	59,00,824	98,69,641
	Expected Wealth	4,92,285	16,87,165	43,41,925	99,44,360	2,13,77,730	4,41,70,615
10000	Investment	7,32,612	19,12,491	38,12,698	68,73,000	1,18,01,647	1,97,39,283
	Expected Value	9,84,570	33,74,330	86,83,850	1,98,88,720	4,27,55,460	8,83,41,230

Let's see the total Investment and Expected Wealth in 5/10/15/20/25/30 years, if you invest in Large & Mid Cap, Balanced, ELSS Fund through SIP with an expected Annualised Return @15%.

**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.

Tarun Das M.Com, CMA, MBA (Finance),  
Registered AMFI (Association of Mutual Fund in India) MFD (Mutual Fund Distributor).  
Mobile & WhatsApp – 9674041173 Mobile: 9871970057

Investment in Large & Mid Cap, Balanced, ELSS Fund ( Expected Annualised Return @ 15%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	60,000	1,20,000	1,80,000	2,40,000	3,00,000	3,60,000
	Expected Wealth	89,682	2,78,657	6,76,863	15,15,955	32,84,074	70,09,821
2000	Investment	1,20,000	2,40,000	3,60,000	4,80,000	6,00,000	7,20,000
	Expected Wealth	1,79,364	5,57,314	13,53,726	30,31,910	65,68,148	1,40,19,642
5000	Investment	3,00,000	6,00,000	9,00,000	12,00,000	15,00,000	18,00,000
	Expected Wealth	4,48,410	13,93,285	33,84,315	75,79,775	1,64,20,370	3,50,49,105
10000	Investment	6,00,000	12,00,000	18,00,000	24,00,000	30,00,000	36,00,000
	Expected Wealth	8,96,820	27,86,570	67,68,630	1,51,59,550	3,28,40,740	7,00,98,210

Let's see the magic of your wealth, if you step up your SIP amount by 10% annually.

Investment in Large & Mid Cap, Balanced, ELSS Fund ( Expected Annualised Return @ 15%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	73,261	1,91,249	3,81,270	6,87,300	11,80,165	19,73,928
	Expected Wealth	1,06,448	3,95,742	11,10,000	27,83,631	65,81,747	1,50,22,270
2000	Investment	1,46,522	3,82,498	7,62,540	13,74,600	23,60,329	39,47,857
	Expected Wealth	2,12,896	7,91,484	22,20,000	55,67,262	1,31,63,494	3,00,44,540
5000	Investment	3,66,306	9,56,245	19,06,349	34,36,500	59,00,824	98,69,641
	Expected Wealth	5,32,240	19,78,710	55,50,000	1,39,18,155	3,29,08,735	7,51,11,350
10000	Investment	7,32,612	19,12,491	38,12,698	68,73,000	1,18,01,647	1,97,39,283
	Expected Value	10,64,480	39,57,420	1,11,00,000	2,78,36,310	6,58,17,470	15,02,22,700

Let's see the total Investment and Expected Wealth in 5/10/15/20/25/30 years, if you invest in Small Cap Fund through SIP with an expected Annualised Return @20%.

Investment in Small Cap Fund ( Expected Annualised Return @ 20%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	60,000	1,20,000	1,80,000	2,40,000	3,00,000	3,60,000
	Expected Wealth	1,03,454	3,82,364	11,34,295	31,61,479	86,26,708	2,33,60,802
2000	Investment	1,20,000	2,40,000	3,60,000	4,80,000	6,00,000	7,20,000
	Expected Wealth	2,06,908	7,64,728	22,68,590	63,22,958	1,72,53,416	4,67,21,604
5000	Investment	3,00,000	6,00,000	9,00,000	12,00,000	15,00,000	18,00,000
	Expected Wealth	5,17,270	19,11,820	56,71,475	1,58,07,395	4,31,33,540	11,68,04,010
10000	Investment	6,00,000	12,00,000	18,00,000	24,00,000	30,00,000	36,00,000
	Expected Wealth	10,34,540	38,23,640	1,13,42,950	3,16,14,790	8,62,67,080	23,36,08,020

Let's see the magic of your wealth, if you step up your SIP amount by 10% annually.

**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.

Tarun Das M.Com, CMA, MBA (Finance),  
Registered AMFI (Association of Mutual Fund in India) MFD (Mutual Fund Distributor).  
Mobile & WhatsApp – 9674041173 Mobile: 9871970057

Investment in Small Cap Fund ( Expected Annualised Return @ 20%)							
SIP Per Month	Total	5 Years	10 Years	15 Years	20 Years	25 Years	30 Years
1000	Investment	73,261	1,91,249	3,81,270	6,87,300	11,80,165	19,73,928
	Expected Wealth	1,21,672	5,23,978	17,28,216	51,67,472	1,47,49,899	4,10,83,567
2000	Investment	1,46,522	3,82,498	7,62,540	13,74,600	23,60,329	39,47,857
	Expected Wealth	2,43,344	10,47,956	34,56,432	1,03,34,944	2,94,99,798	8,21,67,134
5000	Investment	3,66,306	9,56,245	19,06,349	34,36,500	59,00,824	98,69,641
	Expected Wealth	6,08,360	26,19,890	86,41,080	2,58,37,360	7,37,49,495	20,54,17,835
10000	Investment	7,32,612	19,12,491	38,12,698	68,73,000	1,18,01,647	1,97,39,283
	Expected Value	12,16,720	52,39,780	1,72,82,160	5,16,74,720	14,74,98,990	41,08,35,670

**Disclaimer:** The article is for information purpose only and not investment advice. Mutual Fund investments are subject to market risks, read all scheme related documents carefully. The NAVs of the schemes may go up or down depending upon the factors and forces affecting the securities market including the fluctuations in the interest rates.